



TO: Community and Corporate Services Committee

FROM: Community Services

SUBJECT: 2015 - 2040 Strategic Plan Report

Report Number: CM-1-16

Wards Affected: All

File Numbers: 101-03-1

Date to Committee: March 21, 2016

Date to Council: April 11, 2016

Recommendation:

Approve Burlington's Strategic Plan 2015-2040 as attached as Appendix A.

Purpose:

X Address goal or action in strategic plan.

The purpose of this report is to approve the 2015–2040 Strategic Plan.

Background:

Past practice has been that the City of Burlington creates a new strategic plan at the beginning of each council term. Council, along with the staff team decided to pursue a longer term, 25 year strategic plan for Burlington. It is viewed that Burlington is at a critical time in its history as we grow up as opposed to out, and this was an opportunity to create a bold, focused and truly strategic 25 year plan to actively “city-build”.

Burlington is undergoing an important transition and is facing a number of economic and demographic changes that require a coordinated and strategic response. The plan takes into account demographic projections and trends, local, national and global economic projections, the need to grow in place within our current urban boundary, the need to address climate change and the importance of working with community partners.

This strategic plan is fundamentally different than past plans in the content, time horizon covered and how the plan was created. This is a twenty-five year blueprint for city-building and will be supported in more detail through the Official Plan, Transportation Master Plan, Asset Management Plan, Burlington Economic Development Corporation

Strategic Plan, corporate workplan to name a few, in addition to support from our current and future community partners. The plan is a framework for critical decision-making and considers how we manage resources. Although the plan spans twenty-five years, there will be five year work plans, prioritization of goals and initiatives within the plan and on-going conversations with the community in order to address our changing and new or emerging realities.

This strategic plan takes on the challenging issues of today and tomorrow, seizes current and future opportunities, and helps Burlington prepare for the next 25 years.

Discussion:

The preparation of this plan was lead by KPMG, widely considered a world leader in the areas of strategy formulation, policy and program design, advisory services, research and audit. Specifically, Mark MacDonald and J.C. Bourque lead the process and research for this project. Mr. MacDonald and Mr. Bourque have extensive experience in strategy development for various levels of government and in the private sector and provided Burlington with access to leading practices both domestically and globally. KPMG assisted the city with creating an evidence-based, bold yet achievable strategic plan.

Prior to engaging the services of KPMG, the city consulted the community at the front end of the process and undertook research and analysis in order to understand our current and projected demographics, had workshops on intensification, community building and heard presentations from key community stakeholders.

It is important to note that Burlington Economic Development Corporation (BEDC) and the Region of Halton, two of our critical partners, were included in the discussions and participated in the creation of the plan. As well, the city's senior management team was engaged in the process at the front end, during the creation and will play a key role in leading the implementation of the strategic plan.

As this strategic plan will be the guiding document for everything that we do, the Official Plan (OP) process was put on hold until the strategic plan was completed, the BEDC strategic plan will feed into and support the 2015-2040 strategic plan and other partners such as Burlington Public Library and Tourism Burlington's strategic plans will also be created to align with Burlington's Strategic Plan. These are all important steps in creating a cohesive vision for Burlington.

This strategic plan is comprised of a vision, values and four strategic directions with each direction defined by a series of goals, initiatives and progress indicators. The draft Strategic Plan 2015-2040 is found as Appendix "A".

Strategy/Process

Below is the high level process of the strategic plan creation:

Stage 1: December 2014 – June 2015
Research and Phase One Engagement with Community, Stakeholders, Partners and City Staff
Gathered information from above on priority identification, issues and opportunities. Research and presentation on topics such as demographics, intensification, community building and economic development
Stage 2: June – October 2015 Strategic Plan Creation
Using public/staff input and research provided, council and staff team work with KPMG to create a draft Strategic Plan.
Stage 3: October 2015 Pre-Testing with Key Opinion Leaders
The Draft Strategic Plan and Intensification Rendering are pre-tested with Key Opinion Leaders in the community.
Stage 4: November 2015 Refinement to the Draft
Using input from key opinion leaders, council and staff team, lead by KPMG refine the draft strategic plan
Stage 5: December 2015 - January 2016
Phase Two Engagement with Community, Stakeholders, Partners and City Staff
Public engagement on the draft plan to gauge understanding and to identify critical items that are missing
Stage 6: January - February 2016 Refinement made to Revised Plan
Based on feedback from the community, stakeholders, partners and city staff, refinements made to revised plan.
Stage 6: March – April 2016 Revised Plan presented to Committee and Council for final approval
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Implementation and Reporting on the 2015 – 2040 Strategic Plan
On-going implementation and reporting during the life of the plan, including on-going consultation and involvement with the community, stakeholders, partners and staff

The following is an outline of the changes made to the draft plan based on public engagement:

In total, there were 176 changes made.

There were over one hundred pages of input to consider

KEY CHANGES/THEMES:

- Plan is not in plain, clear language. Draft plan contains lots of jargon, technical or bureaucratic language.
- The introduction or why a strategic plan is created, how will it be monitored and implemented needs to be explained in more detail
- A glossary is needed for words/phrases that can't be made into plain, clear language
- Housing Affordability – respondents didn't feel this was addressed well enough in the plan
- Climate Change missing. This is the most pressing issue in the world and it is absent in the plan
- Transit/Transportation – better, more affordable, and in many cases respondents wanted free transit. Respondents didn't feel this was addressed well enough in the draft plan
- Health/Healthy – Respondents said what most people think of when the word “health” or “healthy” is mentioned is about dealing with sickness, access to healthcare etc. Respondents didn't feel that “Healthy City” adequately reflected this sentiment by talking about trails, walking, recreation programs and parks
- Cycling was for the most part left out
- Carbon neutral for the community (not just city operations) is missing
- Storms water/flooding is a big issue and was not addressed. There was some very vague reference under “infrastructure/serving” but is not strong enough language to reflect this issue
- Citizen Engagement – concept of collaborating with elected officials in decision-making was missing

- Make sure that the measures and targets are actually measurable
- Private tree by-law came up quite a few times when referencing tree canopy
- Protection of the rural/urban boundary was missing in the draft plan

When asked on the on-line survey “Of the four Strategic Directions, which is the most important to you?” The following are the results:

- Healthy & Greener City 41%
- Engaging City 24%
- A City that Moves 20%
- A City that Grows 14%

New Goals/Initiatives/Progress Indicators and Objectives Added as a Result of Feedback:

- Upon completion of the Official Plan (OP), the city will prepare a housing strategy (initiative)
- Gold Standard for Bicycle Friendly (progress indicator) and added cycling and “Bikeable” to the document
- Percentage of parks and green space that are within a 15-20 minute walk for residents (progress indicator)
- Total km of multi-use trails (progress indicator)
- Average time through the development process (progress indicator)
- Protection of the rural/urban boundary (Goal 3.2.f)
- Climate change mitigation and the community becoming net carbon neutral (Goal – 3.2.g)
- Research in order to make Burlington net carbon neutral (initiative)
- Complete and implement climate change adaptation plan (initiative)
- Storm water management and low impact development (Goal – 3.2.h)
- The city actively encourages and welcomes collaboration with residents and stakeholders in the decision-making process (Goal – 4.1.h)

- An Accessible City (Overall Objective)
- Healthier Lifestyles (Overall Objective)

General Changes Made to the Plan Based on Feedback:

- Introduction has been expanded and more descriptive
 - Glossary has been added
 - New lead-in sentences added to describe each sub-section within the Strategic Directions, also adds to making connections between sections in the plan.
 - The document now contains more clear and plain language
 - Future on-line version will contain links so that readers may drill down to get more information, watch videos etc.
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Financial Matters:

The cost to create the strategic plan was \$138,150.00. The cost includes fees for consulting services, 18 meetings to obtain feedback from public, stakeholders, partners and staff, meeting expenses with council, the staff team and facilitator, paid advertisements, printing costs for group workbook and draft plans, meeting support materials, and fees to make documents accessible.

There are a number of activities that were completed internally at no additional cost including: On-line surveys, facilitation of public meetings, graphic design of the plan and associated printed materials, social media, Cogeco programming, photography and writing final revisions to the plan.

Total Financial Impact

With the approval of the 2015-2040 Strategic Plan, a financial plan will be developed in the next quarter to inform resourcing and alignment with future capital and operating budget preparations. In the current budget context, \$200,000 has been approved in the first year of the plan to implement initiatives.

Environmental Matters:

Environmental matters are addressed throughout the plan. One of the four Strategic Directions includes “A Healthy and Greener City” where the focus is “the City of Burlington is a leader in the stewardship of the environment while encouraging healthy

lifestyles”. The Strategic Direction has a focus on the environment, energy, climate change mitigation and healthy lifestyles.

In addition to “A Healthy and Greener City” the environment is addressed in two of the remaining three Strategic Directions, specifically “A City that Grows” and “A City that Moves”. These two Strategic Directions include the concepts of complete neighbourhoods, density/intensification, mobility hubs, energy efficient buildings, walkable/bikeable development, and public transportation connections and efficiencies.

Respondents to the Phase Three online survey indicated that of the four strategic directions, “A Healthy and Greener City” was most important to them.

Public Engagement Matters:

There were 3 phases of engagement on the strategic plan:

Phase One (Inform and Involve on IAP2 Spectrum): The first phase engaged the public (which includes the public at large, stakeholders, community groups, citizen committees, community partners and City of Burlington staff) at the beginning of the process. During this phase, the public was asked to identify priorities, rate current quality of life, rate Burlington as a place to live, and asked about quality of services and engagement with the city. This input was used to assist council at the front end to start the conversation and creation of the strategic plan. The findings of this phase were presented to Committee of the Whole on June 22, 2015 by the Data Synthesis Team.

Engagement methods during Phase One included a telephone survey, which is considered statistically valid, on-line survey, group workbooks, facilitated sessions, key stakeholder presentations to council and dotmocracy at car-free events in May 2015.

Priorities identified during this phase:

The following are the top 5 priorities identified during Phase One:

Telephone Survey	Online Survey	Group Workbooks	Car Free Events
Community safety	Sound financial practices	Economic development, prosperity & opportunity	Parks & community open/green spaces
Commitment to infrastructure	Well managed growth	Traffic – specifically congestion	City recreation and sports facilities
Healthy community – health & well being of residents	Commitment to infrastructure	Commitment to infrastructure	Economic development, prosperity & opportunity

Sound financial practices	Transparent decision making	Healthy community – health & well being of residents	Public transportation
Parks & community open/green spaces	Economic development, prosperity & opportunity	Public transportation	Traffic – specifically congestion

Phase Two (Inform and Involve on IAP2 Spectrum): This phase engaged key stakeholders to pre-test the draft strategic plan. Key stakeholders represented a variety of groups including; economic development, environment, community development, seniors, the development industry, arts and culture, business, citizen committees, Burlington Hydro, youth, Halton Region etc. This was used as a beta-test to ensure that we captured the priorities for Burlington. Overall, the feedback was supportive and positive. Based on the feedback, minor changes were suggested and made for Committee of the Whole consideration.

Under the leadership of KPMG, Committee of the Whole sessions were held with members of council and the staff team to make final revisions to the plan prior to testing with the public.

Phase Three (Inform, Consult/Involve on IAP2 Spectrum): This phase tested the draft strategic plan with residents, stakeholders, partners and staff. When testing, there were 3 key questions asked: Is the plan in clear, plain language? Is there anything critical that is missing in the plan? What in the plan do you strongly about (both positive and negative).

Engagement methods during Phase Three included 8 facilitated meetings to obtain feedback from residents, stakeholders and staff using the World Café method, e-mail submissions from community groups, staff/staff groups, citizen committees and individuals, on-line survey, through social media and delivered mail.

Communication Matters: Communication and engagement was a key focus of the strategic plan process. In order to obtain broad feedback, the Communications and Engagement Team created an Engagement and Communications Plan to guide all three phases of engagement during the creation of the plan. Tactics to communicate used included; use of social media, website (www.burlington.ca/strategicplan), e-blast lists, media releases, community outreach, being part of car-free events, Cogeco interviews and part of community programming schedule, intranet site, invitations to meetings and the use of internal ambassadors and facilitators.

It should be noted that in a number of cases a submission came from a group representing hundreds of members but was counted as “one submission”.

The following is a synopsis of public engagement on the city's 25-year strategic plan:

- Statistically Valid telephone survey: 771 interviews
- Online surveys: 716 surveys completed
- Group Workbooks – Planning for our Future: 108 workbooks completed, representing 503 people
- Facilitated sessions with over 200 City of Burlington staff at all levels of the organization
- Input obtained at events representing 90 people
- Input obtained on the draft plan from residents and key partners through workshops, e-mails and by phone: just over 200 people
- Key stakeholders' input during various phases of the process, representing more than 25 community groups and their more than 1,000 members, as well as members of boards, commissions, businesses, citizen committees and agencies.

Conclusion:

The 2015-2040 Strategic Plan was developed with substantial community input and reflects Council's vision and priorities.

This plan is a framework for critical decision-making and considers how we manage our resources. Although the plan has a 25 year horizon, there will be five year work plans, prioritization of goals and initiatives within the plan, budget considerations, and on-going conversations with the community in order to address our changing city during the life of the plan.

With the approval of the 2015-2040 Strategic Plan, a financial plan will be developed in the next quarter to inform resourcing and alignment with future capital and operating budget preparations.

Respectfully submitted,

Michelle Dwyer, Coordinator, Strategic Initiatives

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Appendices:(if none delete section)

- a. Burlington's Strategic Plan 2015-2040 Draft

Notifications: (after Council decision)

Name:	Mailing or E-mail Address:

Approved by:

Joan Ford, Director of Finance

Nancy Shea Nicol, Director of Legal Services & City

James Ridge, City Manager

Reviewed by: